

Probate Quick Reference Guide

The Probate quick reference guide will give information about the following screens:

~Header Screen~

This screen is used to record information about the decedent or individual that the case is for.

~Party Screen~

This screen is used to record information about the parties associated with the case.

~Schedule Screen~

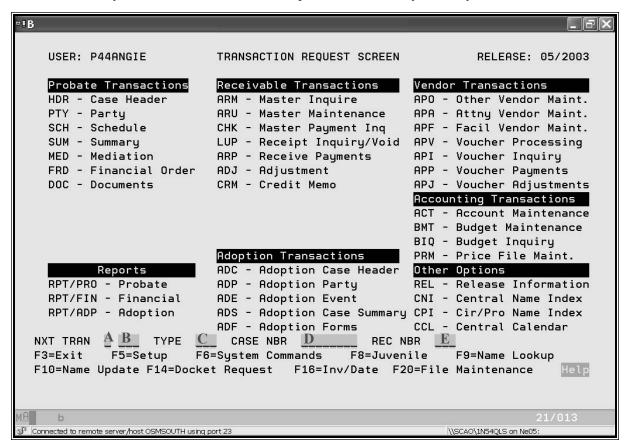
This screen is used to record information about the activities which occur in connection with this case.

~Summary Screen~

This screen summarizes the header, party and schedule screen for the case.

Probate Transaction Request Screen

The transaction request screen is the main menu for the JIS probate court system. It allows you to access the screens you will use to enter data or inquire on data already in the system.



A - Next Tran - The Next Tran field is used to access the probate and civil system. There are two valid codes:

P = Probate C = Civil

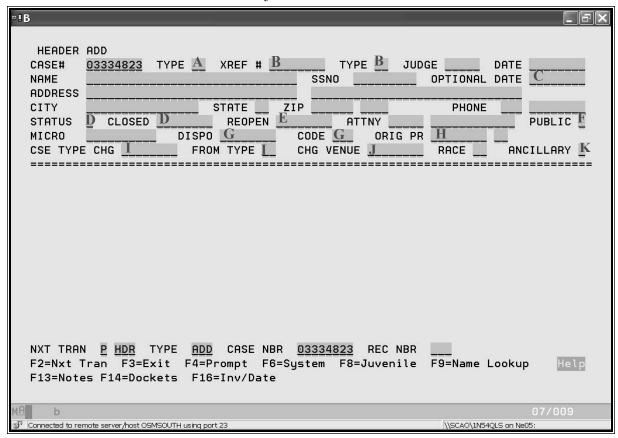
- **B** Next Tran The second field is used to tell the system where you want to go. All of the codes listed on the Transaction Request Screen are valid codes.
- C Type This field is used to tell the system what you want to do. The following are valid options.

ADD = Add MOD = Modify DEL = Delete INQ = Inquiry

- **D** Case Nbr This field is used to tell the system what case number to work with.
- E Record Nbr This field is used for two different screens. When modifying an event, enter the event number into this field. When modifying or inquiring on a particular party, enter the party number into this field.

Probate Header Screen

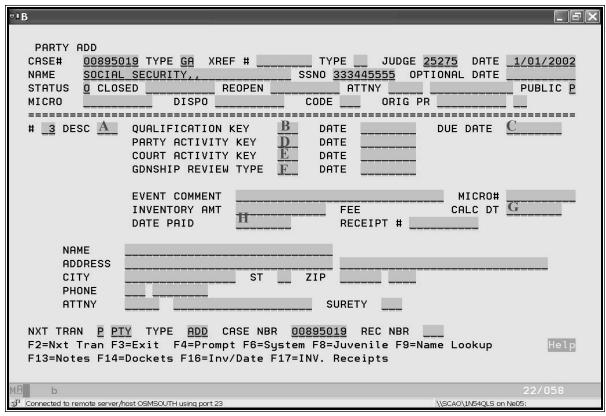
The case screen holds information about the juvenile.



- A Case Type Press <F4> for a list of valid codes or refer to Table 8.
- **B** XRef and Type- This is used to cross reference anothe case, enter the case number and type.
- C Optional Date Enter the dob for a minor or the date of death for a deceased estate.
- D Status and Closed Enter the status of this case O = Open, C = Closed, A = Administrative Closed.
- E Reopen Enter the date the case was reopened. The status must be "O" when reopening.
- **F** Public Enter the public status for this case. Press <F4> for a list of valid types.
- G Dispo and Code Enter the dispo date and code for this case. Press <F4> for a list of codes.
- H Orig PR Displayed is the original PR date and party number.
- I Case Type Change Enter the date that you changed the case type and the former case type code.
- J Change Venue Enter the date you received the change venue case.
- **K** Ancillary Enter an "X" if this case is ancillary to the circuit court.

Probate Party Screen

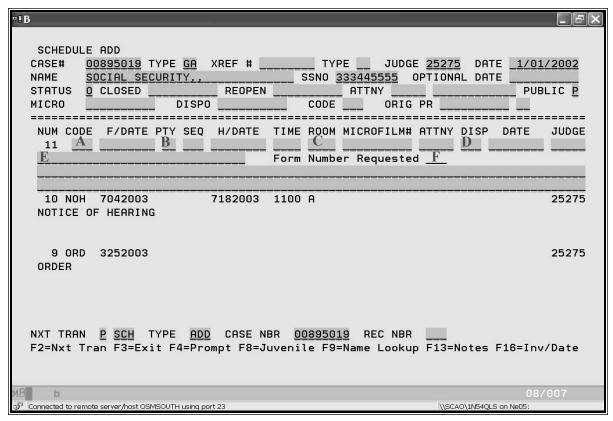
The party screen is used to hold information about the parties.



- A Description Prompt <F4> for a list of valid party descriptions.
- **B** Qualification Key- Enter the type of qualification. The valid codes are AOT Acceptance of Trust and BND Bond.
- C Due Date Enter the date that actions are due if different than the qualification date.
- **D** Party Activity Prompt <F4> for a list of party actions.
- **E** Court Activity Prompt <F4> for a list of court actions.
- **F** Guardian Review Prompt <F4> for a list of review codes.
- G Calc Date Enter the date the Inventory Fee was calculated.
- H Paid Date Enter the date the Inventory Fee was paid.

Probate Schedule Screen

The schedule screen is used to add information about the case.



- A Code Enter the code for this event. Prompt <F4> for a list of valid codes.
- **B** Party Enter the party number that this event is associated with. Prompt <F4> for a list

of parties.

C - Room - Enter the courtroom number that the hearing will be held in. Prompt <F4> for a

list of courtrooms.

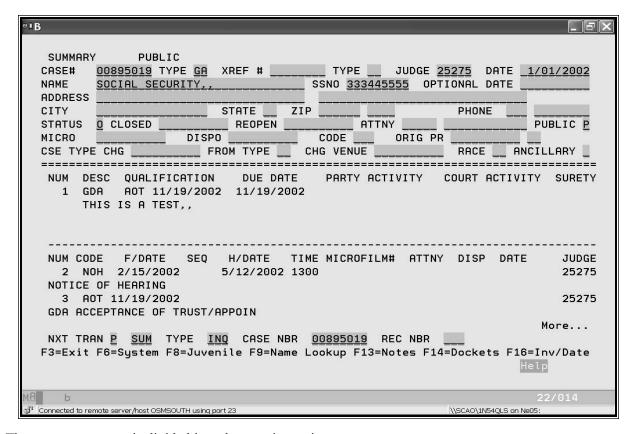
- **D** Disposition Enter the disposition code for this event. Prompt <F4> for a list of codes.
- E Comments Enter comments for this event. If left blank, the sytem will enter code descrip-

tion.

F - Form Number - Enter the form number that you are creating. Prompt <F4> for a list of forms.

Probate Summary Screen

The summary screen combines the header, party and schedule screens into one display or print out. To display this screen. From the next tran line, enter SUM/INQ along with the case number and suffix number and press <Enter>. The system will display the following screen.



The summary screen is divided into three main sections.

HEADER - The system will display key information from the header screen on the top of the summary screen.

PARTY - All parties will be displayed in party number sequence.

SCHEDULE - All event records will be displayed in date sequence.

Use the <Page Up> and <Page Down> keys to navigate through the pages.

Civil Quick Reference Guide

The Civil quick reference guide will give information about the following screens:

~Civil Header Screen~

This screen is used to record information about the plaintiff and defendant that the case is for.

~Civil Party Screen~

This screen is used to record information about the parties associated with the case.

~Civil Schedule Screen~

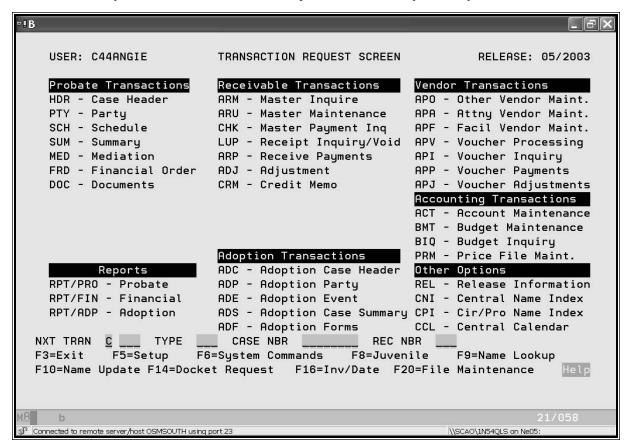
This screen is used to record information about the activities which occur in connection with this case.

~Civil Summary Screen~

This screen summarizes the header, party and schedule screen for the case.

Civil Transaction Request Screen

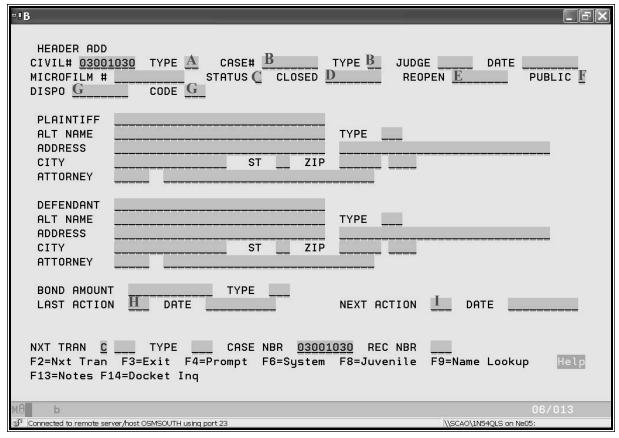
The transaction request screen is the main menu for the JIS probate court system. It allows you to access the screens you will use to enter data or inquire on data already in the system.



Enter "C" on the Next Tran line and press <Enter>. The system will switch to the civil system.

Civil Header Screen

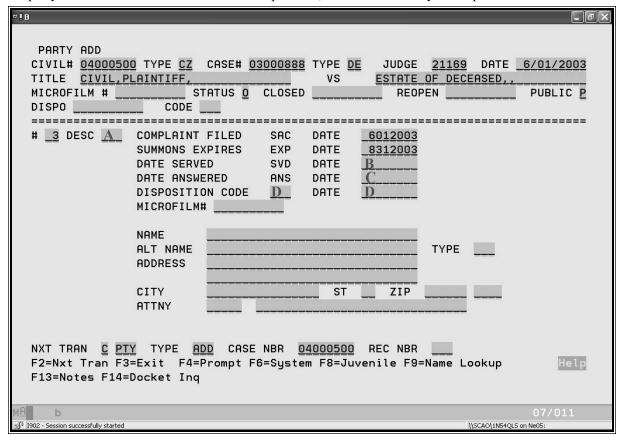
The case screen holds information about the plaintiff and defendant.



- A Case Type Press <F4> for a list of valid codes or refer to Table 8.
- **B** XRef and Type- This is used to cross reference this case with a probate case, enter the case number and type of the probate case.
- C Status Enter the status of this case, O- Open, C = Closed, M = Mediation, U = Under Advisement.
- **D** Closed Enter the date this case closed. The case can't be closed if parties active.
- E Reopen Enter the date the case was reopened. The status must be "O" when reopening.
- **F** Public Enter the public status for this case. Press <F4> for a list of valid types.
- G Dispo and Code Enter the dispo date and code for this case. Press <F4> for a list of codes.
- **H** Last Action Displayed is the last action of this case.
- I Next Action Displayed is the next action of this case.

Civil Party Screen

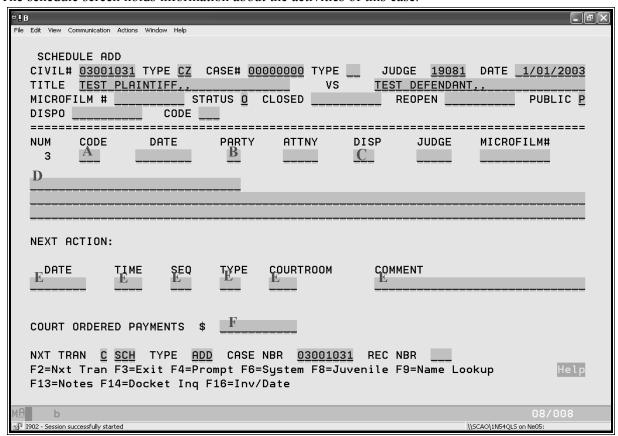
The party screen holds information about the plaintiff, defendant and any other parties of this case.



- A Description Press <F4> for a list of valid descriptions.
- **B** Date Served- Enter the date the summons was served on this party.
- C Date Answered Enter the date this party answered the summons.
- **D** Disposition Enter the disposition code and date for this party.

Civil Schedule Screen

The schedule screen holds information about the activities of this case.



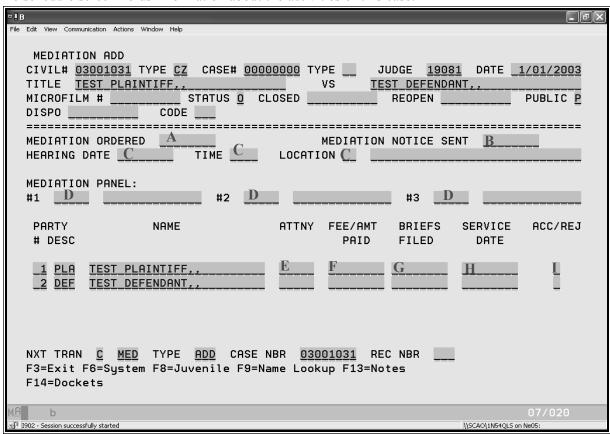
- A Code Press <F4> for a list of valid codes.
- **B** Party- Enter the party that this event is associated with. Enter "99" to associate with

all parties.

- C Disposition Enter the disposition code for this event. Prompt <F4> for a list of codes.
- **D** Comment Enter comments associated with this event. If left blank, the system will enter the code description.
- **E** Next Hearing Enter the next hearing information.
- **D** Crt Ordered Pmnt Enter the amount of court ordered payments associated with this event.

Civil Mediation Screen

The schedule screen holds information about the activities of this case.



- A Mediation Order Enter the date mediation was ordered.
- **B** Mediation Sent- Enter the date the mediation notice was sent.
- C Hearing Info Enter the next hearing information.
- **D** Mediation Panel- Enter the panel members bar codes. Prompt <F4> for a list of attorneys.
- **E** Attny- Enter the attorney for this party.
- F Fee/Amt Paid Enter the amount paid by this party.
- G Briefs Filed Enter the date this party filed their briefs.
- H Service Date Enter the service date.
- I Acc/Rej Enter if accepted or rejected by this party.